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ABSTRACT

The paper takes a critical view of current approaches to training administrators or managers in education in the United Kingdom. Criticisms focus mainly around the hands-on approach whereby the trainee learns the best techniques from colleagues and dismisses most academic studies of management practices. The paper summarizes the thinking behind a supported open learning course in management development in education taught by the Open University in Great Britain, and explores the extent to which initial evidence suggests it is achieving its purposes. The course is attempting to promote a more reflective approach to management issues as a means of linking close-to-the-job training with academically rigorous work. The paper concludes that while much personal and organizational learning is being promoted by the course, one of its more innovative ideas, that of students acting as internal consultants, has not yet been successful. The reasons for this are considered. (Contains 24 references.) (Author/DM)

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"Some of my senior colleagues would benefit": linking individual and organizational learning through supported open learning.

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Comments on this paper would be most welcome, by post or e-mail.

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Abstract

This paper summarises the thinking behind a supported open learning course in management development in education taught by the Open University, and explores the extent to which initial evidence suggests it is achieving its purposes. The course is attempting to promote a more reflective, investigative approach to considering management issues as a means of linking close-to-the-job training with academically rigorous work. The paper concludes that while much personal and organizational learning is being promoted by the course, one of its more ionnovative ideas, of students acting as internal consultants, has not yet been successful. The reasons for this are considered.

Introduction: an issue of culture.

A constant trend in education policy in England and Wales since the mid-1980s has been the denial of academic contributions to teachers' professional development. Summed up best by the dismissal of much initial teacher education as "barmy theory" by the then-Secretary of State for Education, Kenneth Clarke, it was also encapsulated by the report of the School Management Task Force (SMTF 1990) set up by one of his predecessors, Kenneth Baker, to investigate the nature of educational management training and development. This advocated "on the job" or "close to the job" training as against traditional academic courses. More recently the arrangements for a National Professional Qualification for Headship (NPQH), to be developed under the aegis of the Teacher Training Agency (TTA) which has been given responsibility for all initial and post-experience education and training for school teachers, have been marked by a resistance of higher education's input into the development process and a strong emphasis on "practical" assessment.

This apparent separation of leadership and management development into academic and practical elements presents serious dangers and difficulties for educators working in the area. In particular, there is the danger of short-termism, with "quick fix" recipe-book management development (Bennett 1995, 1996) becoming the norm. Already at what is usually referred to as the "middle management" level - departmental chairs/heads of department in secondary schools, and curriculum co-ordinators/subject leaders in primary schools - this worrying tendency is all too evident, with works such as Kemp and Nathan (1989), Donnelly (1990) Dunham (1995) and West (1995) making the early running. The interpretation of competency-based vocational training which is current in the UK under the auspices of the National Council for Vocational Qualifications (NCVQ) and which has emerged

in general management training in the work of the Management Charter Initiative (MCI) has further strengthened the tendency towards "hands-on", "practical" training away from more reflective or intellectually rigorous education (see Bennett 1997 for an outline of this). The danger of all these analyses of management training needs is that they rest the development of individuals within a narrow and constraining paradigm of orthodoxy which prevents existing assumptions about good practice from being challenged and leave the trainee accepting uncritically a received notion of "best practice". The result is periodic attempts by writers critical of "managerialism" and ideologically hostile to the proposition that education is not a unique form of organization which requires unique actions by those responsible for it to rubbish the entire management development movement - the most recent being Gunter (1997).

Management development strategies which preserve expectations and understandings untouched, and tinker instead with methods and technologies for achieving pre-ordained goals are comfortable, and can be dismissed as irrelevant in the way that Gunter and others have done. Argyris (1990) has presented an analysis which shows how organizations can "defend" themselves against potential threats to their prevailing orthodoxies and norms. Schein (1992) has suggested ways in which organizational expectations and assumptions are sustained despite challenges to their validity. Senior members of such organizations would be likely to do well within the fix-it recipe-book school of management development. Members of staff who seek to challenge orthodoxies, however, are likely to find themselves moved on or out by senior colleagues. In this world, personal professional development and organizational development can only co-exist when the individual fits into the organization and buys the values and assumptions of the workplace.

However, there is an alternative approach. Writers such as Pedler et al. (1990) and Garratt (1987) in the United Kingdom, and Senge (1991) in the USA, has developed the concept of the learning organization, in which such defensive strategies can be overcome. In the ideal learning organization, individuals learn to challenge orthodoxies and the organization learns to respond to those challenges positively. Such an approach to professional development requires an emphasis upon reflection, and it is notable that in many higher degree programmes in educational management and leadership in the United Kingdom there is a great emphasis upon the principles of reflective practice (Schon 1983, 1987) as a counterweight to popular "recipe book" writing (see Aspinwall 1996). However, Eraut (1994, 1997) has been critical of Schon's formulation, suggesting instead that we can distinguish between "skilled behaviours" and "deliberative strategies" in professional practice. Skilled

behaviours are complex but routinised behaviours which require little deliberation before they are called into service, whereas deliberative strategies require knowledge of the context and the situation, and the ability to deploy concepts of potentially practical courses of action. Planning, problem-solving, analysis and evaluation are examples of deliberative strategies, because thought is necessary: deploying routines or consulting a manual is likely to be inadequate. Deliberative strategies in particular depend upon acquiring and interpreting information.

Eraut's formulation suggests that there may be room for both recipe-book management training and thought-based management education. It further suggests, as do the proponents of learning organizations, that the development of deliberative strategies must be centred upon the workplace. However, there is no reason to move from there to a rejection of the role of higher education in developing such deliberative capacities. This is what the course being discussed here is attempting to do.

A brief word of background.

Administrator preparation in England and Wales rests on individual motivation rather than any formalised requirements, and there is relatively little institutional or individual commitment to it. Currently, the situation relating to management and leadership in schools in the United Kingdom may be summarised as follows:

- Administrator training is not yet compulsory in the United Kingdom as a prerequisite for headship/principalship or a leadership or management post, although the TTA is about to launch its headship preparation qualification (the National Professional Qualification for Headship or NPQH) and has begun consultations about other national qualifications, for "subject leaders" (departmental chairs/curriculum co-ordinators) and "expert teachers".

- Management and leadership responsibilities are diffused widely through schools and colleges in the UK: there is no clear divide between "teachers" and "managers" or "administrators" in educational organizations.

- Staff development budgets in the United Kingdom are small, rarely reaching 2% of the total budget for the organization, and are now devolved to individual schools/colleges, thus reducing opportunities for economies of scale.

- There is no tradition of teachers funding their personal professional development: instead, this has been done through secondments, support for part-time study, and short training programmes provided by the local education

authority (LEA). However, alongside the devolution of staff development budgets to individual schools, LEA training units have become self-funding. This has reduced the extent of in-service provision and made more teachers consider paying for their own professional development, particularly for qualification-bearing programmes.

Against this dual background of, on the one hand, increasing short-termism in professional development, policy-makers' resistance to the role of higher education in teacher professional development, and financial stringency, and on the other, a growing enthusiasm for developing a more open and questioning approach to professional development and practice through the principles of the learning organization, the Open University had to introduce a new programme in 1995 to replace its still-popular but increasingly dated course called *Applied Studies in Educational Management*. This course, first offered in 1985, had required the students to complete three small-scale research projects investigating aspects of the management of a school or college, and present 5,000 word reports on each. It was the final part of the university's Advanced Diploma in Educational Management, and had as a prerequisite the completion of an undergraduate-level course which introduced the students to management concerns, and approaches to analysing organizational issues from a management perspective. It is a tradition within the Centre responsible for the new course that a replacement should not simply be an update of the old, but should be rethought in the light of experience and changing needs and circumstances. As well as being the final module of the Advanced Diploma, the new course would also be part of the university's MA in Education, and although it would not be possible within that award's regulation to make any course a pre-requisite for studying the new one, it would be possible to emphasise the need for prior knowledge if a student was to have a chance of success. It was therefore appropriate to see this new course as linked to the existing MA module on management in education, which was a sophisticated treatment of the subject, and to the other introductory programme provided by the Centre.

E828 Educational Management in Action".

The course which has resulted is entitled "Educational Management in Action", and has the course code E828. It represents 400 hours of study - one-third of the MA programme. It has taken the basic assessment structure of its predecessor, asking students to complete three investigative projects focused on management issues in an educational institution, and to produce from each study recommendations for action to improve management practice. Like the previous course it requires them to work on projects from three of the five distinct management areas around which the course is

organized. However, the "set projects" are deliberately drawn very broadly so that students can tailor the particular topic they choose to the circumstances of their investigation. The full list of topics, in the five management areas, is to be found in table 1.

The course materials, in common with other MA modules, consist of a study guide, a pair of commissioned Readers, and an assessment guide. In addition, this module for the first time on the MA course, has included a video which has focused attention on carrying out semi-structured interviews. Students are allocated a tutor based in the geographical region, who is contracted as an Associate Lecturer on a part-time basis. Tutors are responsible for commenting upon each project proposal, giving guidance on the work for each project, assessing each project report and providing feedback. The course team has developed a proforma for feedback which links the tutor's comments to the report structure recommended in the assessment guide. They also encourage the tutor to treat marking as a dialogue, raising points in the text and debating them with the student. The result is, according to some students, more detailed feedback than they have received on previous MA courses - and far more detailed feedback than colleagues of theirs have received on MA work for other universities! There is no examination: instead, the final project carries a higher proportion of the total marks than each of the first two, and is double-marked.

The thinking behind the course was to build upon the content and management knowledge acquired from the previous management course the students had taken by developing skills of investigation and analysis relevant to the problem-solving tasks managers face. Students would be given the opportunity to advance their understanding of the material they had encountered previously by applying management concepts and management theory to immediate issues in the workplace. Thus there was relatively little new discussion of management literature in the course. Instead, each of the set projects was discussed fairly briefly, and some cross-referencing made to articles in the other course readers and to other possible readings or sources of information. The purpose of this discussion was to help the students orient themselves to the broad area of the topic, and to assist them to identify possible issues within their organization to explore should they choose to attempt that particular project. In addition, there was at least one, and sometimes two, sample case studies related to the topic in one of the two course readers, which was discussed in terms of the way the problem had been conceptualised and the approaches taken to examining it.

The bulk of the new material in the course focused on the business of investigating management problems within an organization. In most cases, the students would not

have been expected to undertake any systematic investigation of practice around them, or in another school or college, and would not have met the questions of appropriate methodology, data-collection techniques or issues in analysing and writing up which are the stock-in-trade of methodology courses. The first section of the study guide and its associated reader therefore took them through some of these issues.

It was in this area that the course team saw itself as attempting something different from most other courses on research methods. Its predecessor course had trailblazed the concept of small-scale studies in the United Kingdom, and the research methods reader it put together is still recommended reading in many universities. Now E828 has attempted to extend this field by re-conceptualising the idea of small-scale research in two ways - by extending the kinds of investigations or interventions that might be included, and by introducing the students to a wider range of data-collection techniques that might be appropriate to such work. .

Investigations, not Research.

The course hardly talks about "research" at all. Instead, it refers to the students carrying out investigative projects. This has been done to avoid encumbering students with the linguistic baggage the word "research" carries, and to emphasise that we are offering a variety of approaches to the task of exploring existing practice. By talking about "investigations" the course team hoped to make it possible for students to recognise that there were a number of different approaches and strategies open to them to use in exploring their chosen topics.

Since the course requires the students to complete three management-related projects in the space of nine months, it was felt that experimental or quasi-experimental studies were likely to be difficult. The students were therefore advised of a number of different "investigative strategies": evaluation, audit, survey, case study, and action research. These were seen to have different degrees of potential for different set projects: for example, evaluation and case study were both promising approaches to the project on examining the process of planning or introducing a reform in what is provided for students in a school or college, while audit had promise for the project on examining an aspect of the monitoring and control of resources. Tutors were advised to encourage students to attempt more than one different approach to investigation.

Equally as important, however, was the recognition that the majority of students who would be undertaking these investigations would be working in the organization they

were studying. Further, since we were asking them to explore management issues, it is likely that they would be involved in some way in the subject. Thus, they were not "researchers" in the traditional sense: they were not even "participant observers" in the ethnographers' sense; they were integral parts of the subject under study. Hence they were closest to the researcher role developed by action researchers such as Lomax (1994: 159, 160), who states that action research is "about seeking improvement through intervention" and "involves the researcher as the main focus of the investigation". Lomax's view, however, is too directly focused on the researcher for some of these studies: we had to find a way of establishing the relationship between the investigator and the subject which did not necessarily assume the egocentrism of action research. In looking for this, we realised that we were offering the students the opportunity to undertake three kinds of study:

- one undertaken by the student at their own initiative, focusing on an aspect of work which was ongoing with a view to making recommendations;
- one undertaken by the student at someone else's request, focusing on an aspect of work which was ongoing or examining existing practice with a view to making recommendations;
- one undertaken by the student as part of their own direct responsibilities where they were attempting to bring about new practice directly.

Thus they might be researchers or change agents - and as change agents, they may be acting as action researchers or simply as catalysts to promote change.

In addition to this, we realised that as well as enhancing their own understanding of management issues through exploring organizational problems, our students were potentially improving the performance of their own schools and colleges. Most of them were likely to examine their own practice, or issues relevant to their own immediate responsibilities, but the learning they achieved from such work was potentially useful to others in similar roles. They thus became a latent source of expertise for others to call upon. More senior staff, whose responsibilities were more extensive and spread across the whole organization, were also likely to have a direct impact upon the work of those who were accountable to them, and anyone who engaged in interviewing a colleague about their practice was likely to have an effect upon the person interviewed. From this potential for organizational improvement came the concept of the internal consultant, which is proposed in the course materials as one possible approach that might be taken towards an investigation.

Internal consultancy, and other ways of investigating practice.

The term "internal consultant" was drawn originally from the practice of some large commercial organizations of establishing an in-house training function, which sometimes worked through allocating individual staff members to individuals or departments to assist them with particular problems. Consultants differ from managers in that they have no direct responsibility for the work of the person to whom they are acting as consultant, and can eventually conclude the consultancy. Thus the person receiving the consultation remains responsible at all times for the actions they take during and after the consultancy. Managers, on the other hand, are always responsible for what is being done.

One of the major failings of many schools in the United Kingdom is their failure to acknowledge the expertise of individual staff members who work there. Very few newly-appointed departmental chairs, for example, faced with chaotic records and stock cupboards in their new appointments, would think of approaching a school administrator with a request for assistance in creating a filing and records system, even though administrators maintain such records routinely. It would somehow be demeaning and unprofessional to ask for advice from non-professionals; indeed, in some schools, even to ask advice of fellow-professionals would be doubtful practice: an acknowledgement of professional inadequacy (Bennett 1995). But staff who have completed demanding programmes of management development may well have expertise that could be placed at the disposal of their colleagues.

Consultancy can be divided broadly into two forms. Traditionally, a consultant is presented with a problem, explores it, produces a report and recommends changes in practice to deal with it. It is then entirely in the hands of the client whether any changes are made. A rather different approach is that of "client-centred consultancy" (Cockman et al. 1992, Hope 1994) which sees the process of consultancy as involving the client in defining the problem and working through the possible solutions. It is a more negotiative approach, which is intended to generate a higher level of commitment on the part of the client or clients, so that the eventual outcome is changed performance which has been accepted by all involved. Such a consultancy is more likely to be acceptable to colleagues, since it has implications of collegiality and shared activity, and the expertise of the consultant is less overtly displayed.

Many of the techniques of data collection and analysis are similar for consultancy and research. For academic purposes, it is also possible to require of the investigative process similar standards of rigour to those for any other investigative study. This

course therefore provided an opportunity to introduce students to the possibilities of internal consultancies, which would enable them to deploy their skills and expertise more widely, while at the same time ensuring that they adopted suitable standards of investigation for the responsibilities that might result from their work. In other words, it provided a potential training ground for staff who might be able to help others to learn: developing a culture of learning within their school and college.

Not all of the projects presented by students would or could be of this type. As was indicated above, the programme was not limited to staff in senior positions, and experience with its predecessor course had shown that we could expect the students to include everyone from headteachers through to relatively recently-qualified main scale teachers with no additional responsibilities. Drawing on the ideas in this discussion, the course team therefore identified four possible "research roles", and students were required in their project proposals to state which role they intended to pursue and why. The roles were:

- Internal consultant, discussed in the terms just outlined.

- Change agent, where a student was reporting directly upon a piece of work which had recently been undertaken or was ongoing, and in which they had been attempting to introduce new practice of some sort. A project on developing new school development plan might be cast in terms of change agency. These projects are likely to come closest of any undertaken for this course to forms of action research.

- Interested researcher, in which there was no consultancy or change agent relationship with those participating in the subject being explored, but in which the researcher nevertheless had an interest in the outcome of the study. A study of the arrangements for consulting with parents, or of the transition arrangements for children coming from primary to secondary school, might be undertaken from this perspective.

- Disinterested researcher (a deliberate use of the term to stop it being confused with "uninterested", one of the course team's particular irritants!), wherein the researcher was exploring a topic in which the outcomes had no implications for their work: the study was an intellectual enquiry, or undertaken in a different institution altogether. Thus a head of the history department who examined staff appraisal practices in the maths department, or in a history department in another school, might be able to adopt particular practices that were observed during the research but would not be directly affected by the findings.

Reflection or quick fix?

Investigating existing practice is no guarantee on its own that the student will avoid searching for "quick fix" solutions to management problems. Indeed, the fact that the course requires students to undertake three projects in different areas and make recommendations for change should they be appropriate may appear to incline them towards just such an approach. For this reason, the course requires of students a reflective discussion of the work they have undertaken as part of each project, and asks them to exploit relevant literature critically in designing the project itself. Thus at the project proposal stage they will be asked to offer an initial definition of the topic to be investigated, and to indicate the reading they intend to undertake as they prepare it. Reading is not expected to be extensive: students who have observed the recommendations to have undertaken a management programme or module before taking E828 will have the materials from that course to examine, and suggestions are made in relation to each project for relatively accessible materials. In addition, tutors are expected to feed back suggestions in their response to the project proposal.

The upshot of such reading is expected to be a refining and focusing of the attention of the project's data collection, and the methodology selected for it. The course's study guide and assessment guide both emphasise what is called the logic or "ology" of the methodology: the linkage which leads the student from an initial definition of the problem through to a refinement of their understanding of what the issues are that appear to need exploration, and their relationship to them. This influences their final choice of their "research role". From there they should move on to identify the sorts of information that might throw light upon the problem or issues, and to identify both the appropriate research strategy and the methods of data collection which might generate reliable and valid information that will help them to come up with defensible conclusions and recommendations for improved practice, be it theirs or someone else's. That approach should then be critiqued at the end of the project: was the definition correct? Were the role and strategy, and data collection approached appropriate? What did the findings demonstrate? How might the work have been improved? This requirement should always lead the student to reflect critically upon their understanding of the management principles they had applied, and upon their own practice as investigators; depending on the nature of the project itself, it could also lead them into a detailed reflection upon their own managerial practice and upon their understanding of their place of work.

The effects of the course, and the validity of the internal consultancy model.

E828 has now completed two years of presentation. To examine the extent to which it has been able to promote individual and organizational learning, and the extent to which the internal consultancy model has been usable, a small-scale study was undertaken in the winter of 1996/7. This has employed the following data sources:

- a large-scale evaluation survey of the course undertaken as a matter of routine by the university at the end of the first presentation year of the course. This was sent to all 370 students who registered on the course. Part of the questionnaire included a request for comments upon aspects of the course, and a total of 91 statements were made in response to questions concerning the course's relevance and practical application to their job, a further 67 to questions concerning their personal professional development, and another 55 to questions about the course' usefulness at work. Almost all of these 213 statements were supportive of the learning they had achieved on the course. The comments made here relate both to personal learning and the extent to which they were able to use that learning within the organization to bring about changed or improved practice.

- extended semi-structured telephone interviews with a sample of the students who have undertaken the course in one region of the country. A total of 22 interviews were planned, representing one-quarter of the student cohort; in the end, 15 were completed. The sample was drawn to balance geographical location and gender; details of the students' seniority in the workplace, or which sector of education they were employed in, were unavailable. In the end, only two came from primary schools - both headteachers who had taken up their posts immediately before starting the course, but after completing the other MA module on management in education. Three of the others were senior teachers or deputy heads in secondary schools, while a fourth was deputy head of a Special School; one was a second-in-charge of a subject area; and the remainder were secondary school "middle managers"- heads of department or teachers with pastoral responsibilities. Three of these teachers had gained promotion to senior teacher status since starting E828, and all three attributed that achievement in whole or in part to the learning that they had achieved through their combination of studying the other management module on the MA in Education and E828. All of these students were asked to comment specifically upon personal learning, the extent to which that learning could be used at work, the impact it had had upon their school (all were schoolteachers), and the extent to which they had explored the internal consultancy option.

- a questionnaire to all 30 tutors asking for their comments upon the internal consultancy work undertaken by the students, and on their observation of the effectiveness of the model. Half of these were returned.

The data can therefore be regarded as adequate rather than good, but they do allow us to identify the extent to which E828 appears to be satisfying demand and achieving satisfactory outcomes, and to comment on the extent to which internal consultancy is supported by students and tutors.

The data which follow are grouped under three broad headings: the degree of personal learning achieved; the degree of organizational learning or development achieved; and the validity or otherwise of internal consultancy. In relation to the first two headings we shall also explore the extent to which reflection on practice was identified as having occurred.

The degree of personal learning achieved.

Statements relevant to this issue in the survey came mainly from responses to the question,. "to what extent do you feel your study has contributed to your professional development?" Some statements related to understanding the nature of managerial work better:

> Particularly in management issues I am more aware of the factors contributing to an issue and feel I can deal with it better.
>
> I have become more aware of management structure and more experienced in strategies for getting tasks completed from a team.
>
> Broadened my whole outlook and understanding of concepts in use every day and the "politicalness" of the system.
>
> Expanding my understanding of management issues which would otherwise be 'closed' to me due to my position as a hod [Head of Department], in particular 'financial management' on a whole school basis.
>
> Focus on issues and problem solving, providing the motivation and the means to get things done.
>
> Research into own practrice - promotion of critical self-awareness.
>
> Insight gained about whole institution

Some have clearly revealed that the work has not just made them better informed but has also influenced the way they approach problems and think about their work:

> Facilitates analytical approach to planning and organizational issues.
>
> It has helped me to try and quantify the practice and pout the theories to the test.
>
> I am constantly able to apply theoretical frameworks to what actually happens in school, and predict outcomes, successfully.

Several respondents attributed promotion to their knowledge gained from taking the course, or believe that it will be more likely as a result:

> Helped me with promotion and understanding of management skills needed.
>
> Prepared me for promotion within my institution, who sponsored me to do the course.
>
> It has helped equip me with the skills necessary for my mid-management role in school and has motivated me to seek promotion.
>
> I believe it was a significant contributory factor in gaining a promotion.

Only one respondent stated that the course had not contributed to personal learning and professional development; however, the reason for this was apparently to be found at the school:

> There is no professional development in my institution. I have found that in seeking promotion in other schools evidence of study for the MA has been of interest.

It should be noted that this answer did not refer to E828 alone, but to the MA course as a whole.

Interview data were a little different, but most of the respondents emphasised very strongly that they had learned a lot from E828 about approaching and analysing issues of concern in their work. Personal learning focused very strongly upon three dimensions: the capacity to take a whole-school perspective upon an issue; the ability to focus on issues in a disciplined and organized way; and the importance of being able to stand back and view issues dispassionately. However, the same respondents also spoke of the difficulty of engaging in reflection on practice.

In addition, some of the students deliberately chose to investigate some aspect of management which they had encountered in their previous course but had no personal experience of: finance was the main example of this, with a smaller number exploring the issue of staff appointments. These were good examples of the students developing their theoretical understanding of issues from a more general programme by learning to apply the principles learned there in practical settings: one of the aims of E828. It was, however, striking that the number of students who had done this was relatively small. Further, a lot of the critical comments in the survey responses referred to the "repetitive" nature of the projects, which clearly shows that these students had not taken the approach of one of the middle managers interviewed, who set out deliberately to learn to use three different approaches to investigating problems and different techniques of data collection and analysis. This suggests that either the variety of approaches presented in the course materials was not acknowledged, or that students were unhappy about trying too much variety. Both would appear to be indirect criticisms of the tutors.

Taking a whole-school perspective was a particular benefit to the "middle managers", particularly those who had moved into middle management positions shortly before starting the course. Both spoke of the benefits of being able to gain a view of the workings of the organization as a whole, and to move quickly into a stronger position relative to their colleagues. Three others who had gained promotion also spoke of the advantages of the whole-school perspective: it had enabled them to contribute more widely to the discussions of school policy and given them substantial added status within the school. One spoke of a school in which there was almost no staff development, and an autocratic head; however, the same respondent also indicated that the head showed interest in her work and gave her free access to whatever data she needed, the school supported her by paying part of her fees, and she felt entirely at ease with reporting all her findings unedited to the head, however critical they may have been of the school's management. On the other hand, she is now the only member of a school staff of 36 with a higher degree in education.

The two primary heads spoke similarly about their personal learning. For them, E828 provided a vehicle through which to begin analysing the nature of apparent problems in the school and generate potential actions to deal with them. However, the nature of their work made it even more difficult to separate their personal learning from organizational change and development and the possibility of organizational learning than was the case with other respondents.

Several of the respondents, both middle and senior management and the one junior teacher interviewed, commented that as well as gaining more of a whole-school view

they were encouraged by the demands of E828 to take a more focused view of their job and the school they worked in. One, now moving to a senior teacher post in the same school, commented on the way that he was now thinking much more about the direction and purpose of his work, and was much more prepared to challenge colleagues' assumptions. He invoked the idea of "double loop learning" (Argyris and Schon 1978), which is presented in the course in relation to topic-identification and reflection, to explain how his study on the organization of parents' consultation evenings (when parents come to discuss their children's progress with their subject teachers) had led him to discuss the evenings with the Heads of Year who had to organize them, and in the course of the discussion to bring them to focus on the question of what these evenings were actually for. Apparently, this had never been publicly aired before: parents' evenings occurred because they always had done. By raising this question, it was possible to query many aspects of the organization of the evenings, which staff had grumbled about as much as they had taken them for granted.

Others spoke similarly about the importance of this ability to challenge their own and others' assumptions. Several stated that reflection was a crucial part of any attempt to improve their own work. One said that she found it relatively easy to do once she was oriented towards it, being something of an introvert, but E828 actually required her to do it. By facing up to questions concerning the attitudes and feelings of children undergoing transfer from junior to secondary school, and the feelings of newly-qualified teachers about the support the school was giving them as they came to terms with the demands of full-time teaching, she said that she had to re-examine her own assumptions and reconsider what she saw as satisfactory practice. Another middle manager remarked that reflection was in fact a necessary part of all the MA modules if one was to make the most out of the material provided there, but that it was especially important to E828: it provided, he said,

> a huge benefit: it makes you so much more aware of what you and others are doing. It's part of widening one's understanding, to *learn* something from what you do.

However, many of them commented that reflection within the timescale of the separate projects was difficult to achieve at any depth. The most junior teacher interviewed stated that reflection was "very hard in practice" since his duties tended to involve managing the situation and keeping things going. One middle manager commented that she needed to "offload a lot of baggage" in order to be able to reflect, but that she was always one to challenge arguments and assumptions anyway. Another commented that "one's so busy finishing off," and reflection therefore tends to be perfunctory until later on. This opinion that was shared by the tutors, most of

whom said that the reflection in the project reports was adequate rather than of a high quality, and rarely showed any evidence of double loop learning in action (interestingly, the Scottish and Irish tutors dissented from this general judgement). This is not to say that the students interviewed did not think that they had engaged in reflection upon the projects they had done and the learning they had achieved: most of them said that they had found themselves returning to their E828 projects since they had completed the course, not so much in order to look at the substantive findings as to consider the approach they had taken to establishing their perception of the topic, and the way they had gone about studying it. There was a very strong feeling that, at a distance of anything between four and sixteen months from completing their final projects, they were still benefiting from the work they had done in terms of their approach to analysing and understanding management issues.

In practice, the students clearly found it difficult to separate their personal learning from their work on E828 from the impact that it had upon their school. We therefore turn now to the question of organizational change, development and learning.

The degree of organizational learning or development achieved.

It was clear that most of the students, including all those interviewed, made good practical use of the opportunities presented by E828. Interviewees repeatedly stated that they had settled upon projects which were part of their job, and which they would have to undertake anyway. This was to a considerable extent exactly what was envisaged. The result, according to the interviewees, was that the tasks involved in the projects were done much better, in a more focused and rigorous way than would have been the case without the discipline presented by the E828 framework, and several commented that this represented a major step forward in their professional development. Thus one middle manager stated that his first management module provided the framework for analysis, whereas E828 gave him the opportunity to put it into operation. He was able to develop two projects around his responsibility for developing and introducing a programme of Personal and Social Education. The deputy head of the Special School commented that as a result of undertaking her projects within the E828 structure she was forced to pay attention to the dimensions of planning her work, consulting and listening to colleagues and not just listening to hear what she wanted to hear. Another deputy head, from a secondary school, stated that E828 forced him to undertake background reading and set each study into a framework which made him attend to the wider context of the topic.

Just as the middle managers commented on how they took a more structured approach to the tasks they would have undertaken anyway, so both of the primary heads declared that one of the benefits of using E828 as a planning strategy for their first year in post was the way that it forced them to focus their attention on a limited number of initiatives. One stated that it prevented her from "juggling all the balls", and ensured that the topics she chose to focus on could be followed through. The other took a slightly different tack, but stated that the discipline of the recommended project structure forced her to focus her attention not just upon a particular topic but on following that topic through. Thus she was able, for example, to work over an extended period of time on the development of a clearer role for the curriculum co-ordinators in her school.

An important dimension of this focus on personal practice or personal responsibilities, presaged by the last example, is that the work done for E828 frequently had a direct impact upon the organization in which the students worked. This is visible in both questionnaire and interview data. Middle managers interviewed were able to show that they had created and implemented new courses such as in Personal and Social Education, or brought about the reorganization of IT programmes throughout the school; generated totally new approaches to the oversight of pupil transfer into the secondary school from the feeder primaries, and developed a new programme of induction and support for the newly qualified teachers who were appointed to the school. The selection procedure for new staff was substantially changed in one school to include use of job and person-specifications, and in another to introduce changes to the interview procedure. Changes to the arrangements for parental consultation evenings have already been mentioned. At the special school, there was a transformation in both the formal approach of the school and the attitude of many of the teaching staff to the work and professional training of the non-teaching assistants, who are now taking a much more positive role in the work of the school. These are all tangible results; and anecdotal evidence from other tutors and contacts with former students of mine suggests that these are not atypical.

Survey data revealed that approximately 42% of all the statements about the quality of the course specifically declared that the student had been able to influence directly practice in the school or college as a result of their E828 projects. People who made this declaration varied in seniority. One stated,

> I am just a teacher (not promoted post) so I really enjoyed the opportunities to take part and influence management decisions which it is unlikely I would otherwise have been able to do.

Against this, however, another commented

> Not in a promoted post, so little opportunity to use knowledge and skills.

More typical, however, were comments by more senior teachers who made such comments as

> I have used the research techniques gained from my projects to formulate and write my school development plan.

> I have been able to use a lot of my research to suggest improvements within school.

> As my second assignment concerned NQTs(newly qualified teachers) I have been asked to act as Professional Tutor this year and introduce an induction programme.

> Methodology in collecting of data has lead (sic) to improved communication.

Others commented that the real value of the course lay in matters such as

> The real life projects of value to my own studies and the school.

> My own personal involvement in educational issues at school.

> Being able to follow up an area of research which had direct significance to my place of work in order to bring about improvement.

> The opportunity to carry out research into my particular institution and put forward recommendations for change/improvement.

Many of the comments in the survey were more general in nature. For example, in response to the question, "Which one aspect of the course has influenced you most favourably?", respondents made statements such as

> Practical application to own situation.

> Carrying out practical research.

> Personal research into areas requiring change in my present environment.

> Developing aspects of my working situation.

> Being in teaching it was of (i) practical value to me and (ii) practical value to my school.

Some of these more general comments pick up another strand of the interview data, which suggest that as well as concrete changes to organizational policy and practice other, less tangible changes and less obvious but still important results were visible to former students. One interviewee, deputy head of an inner-city secondary school, explained how his examination of public examination results for his school on a value-added basis, using the methodology developed by Levacic (1994) in one of the case studies for the course, had achieved a significant boost to staff morale by demonstrating that the school was not the "sink" school many of its staff believed it to be, but was in fact achieving at a comparable level to many schools in more favoured locations. This had allowed him to go on and explore individual departments' peformance and begin the process of raising performance further, something which would have been seen as further criticism without the previous action. Another senior teacher, who made a point of circulating summaries of his reports to the staff, spoke of heightened awareness of the investigations among the teachers and of the issues that were raised. A middle manager from a rural area school, who has now been admitted to senior management status on the basis of her MA studies, particularly (she says) E828, commented that as a result of the school having been the arena for her studies people are more ready to listen to her, and to acknowledge the possibility that other people may have something to contribute. Both the primary headteachers reported a developing change in the attitude of their staff towards their responsibilities, with more co-ordination, more teamwork, and a greater recognition of the value of individuals'; expertise as a potential resource. But this movement away from insularity and isolation was not by any means a regular or routine occurrence: one middle manager reported on his experience in a school in a small country town, which he described as very territorial and loosely-coupled, and stated that the only impact any of his investigations had was on the course for which he was responsible.

It was clear from many of the comments in the survey responses that one of the pleasures of the course was the opportunity it provided to individual students to undertake research "close to home". This suggests that in many cases the sense that the school or college was a legitimate place for enquiry had not been present prior to their undertaking E828. The fact that such work was being undertaken in schools and colleges throughout the land would suggest that some educational organizations at least were willing to put themselves under scrutiny from within: the beginnings of a learning culture were to be found.

However, if this were beginning to develop in the students' schools, one would also expect evidence of wider reflection on practice. The interviewees were asked if they could identify any such evidence of a more reflective stance being taken by colleagues in the light of the enquiries they had conducted. Answers to this were mixed. Some claimed that their lines of questioning had challenged colleagues' assumptions, as in the example of the organization of parents' evenings cited earlier. Another source of wider reflection was the "ripple effect" of asking questions of your colleagues, however it was done. One respondent commented on the impact of feeding back reports of interviews to the interviewee, and the frequency with which he obtained "did I really say that?" as they read over the report. Only one teacher, however - the deputy head of the Special School - was able to claim that there had been any serious reconsideration of attitudes by the staff as a whole as a result of her work on E828. The two primary headteachers also identified changing attitudes, but attributed these more to the direct impact of changes in practice, such as redefining collaboratively the role fo the curriculum co-ordinators or developing a greater team orientation among the senior managers, rather than to any more deliberative reflection. None the less, it is reasonable to claim that in Eraut's terms there was a greater readiness in some at least of the schools to engage in deliberative strategies when considering problems instead of resorting to skilled behaviours.

Not all of the students who were interviewed were able to claim that their investigations had had an impact upon the school. Three reasons can be identified for this where it occurred. The first was that identified by the junior member of staff who undertook E828 after attempting the management in education module the previous year. Although he had a sound understanding of management issues, and picked on an important whole-school issue for one of his three projects, nothing happened as a result, despite the headteacher encouraging him to undertake it and saying that he would use the findings as a basis for reviewing the school policy in the area. The student volunteered the opinion that he failed to push the results forward, and although he offered the excuse that he was never asked for them, he recognised that he should have made more effort to make his results known. We may draw the obvious conclusion that only when you make a fuss about your findings are people likely to take much notice of them. This was clearly the situation in the case of the middle manager who presented her findings in full to the head and has now become a member of the senior management team even though she is still holding the same substantive post as she held before she began the course.

Closely related to this, therefore, is the position held in the organisation by the internal investigator relative to the subject of the study and to the locus of relevant

decision-making within the school. One deputy head spoke of the importance of "having clout" so that a request for action would result, or decisions could be influenced. It was, again, obvious that the most significant impact on practice was held to have resulted from investigations into practice within the student's particular area of responsibility. It was generally agreed that change was more likely to occur when it was initiated near the top of the hierarchy, and even more likely if the investigations related to aspects of the school development plan. Such studies would be addressing issues which had been defined as priority areas for attention: it would be difficult to turn aside from their recommendations.

However, even where the student was in the upper echelons of the hierarchy, this did not always result in change. One senior manager was clearly frustrated that, despite his careful publication of his findings and recommendations for action, nothing happened as a result. He attributed this to a wider culture of uncertainty within the school, which derived from the school's head having retired through ill health and being replaced by an acting headteacher who was not going to apply for the substantive post. Consequently, there was a feeling that the job of senior management was to keep things ticking over, and not rock the boat. This student reported that a new head had now been appointed, and had asked for copies of all his reports, with a view to taking action in certain areas that he had explored. He was adamant that a crucial factor in any school-wide change resulting from the kind of studies involved in E828 was the attitude of the headteacher.

The validity of internal consultancy as a model of organizational development and learning.

Data on the use and applicability of the internal consultancy model proposed in E828 are only available from the interviews and the tutor questionnaires. The data suggest that the concept was not clearly understood by the students and indeed some of the tutors, and in some cases was rejected by the tutors on the course. A large proportion of the students who claimed to have attempted internal consultancy projects did so from avowed positions of managerial authority, which was at odds with the way the concept was presented. Few of them were able to identify clients to whom they were acting as consultants, and in many cases the initiative was theirs rather than the result of a negotiation. What appeared to be internal consultancy was frequently managers introducing change - acting as change agents, albeit in rather less directive and more supportive ways than many of their colleagues might have done.

Most tutors appeared to regard the concept as a useful one, but felt it was under-used. Only one of the tutors who responded had systematically encouraged students to try out the role in one of their projects, and he was attempting to ensure that they explored a range of roles and research strategies and techniques in the course overall. There was general agreement that projects undertaken from an internal consultant position represented a similar standard of work to those attempted from other investigative roles, and the difficulties students encountered appeared to be related to the broader business of developing sound techniques for data collection and analysis as much as to the specific role. There was, however, some concern that by incorporating the concept of consultancy alongside other options, the course was giving students too much choice before they had achieved a basic level of competence in the processes involved in carrying out small scale investigations. As the most critical of the tutors put it,

> the idea is good but when put in conjunction with the "other roles" by way of choice it is generally considered to be too sophisticated, too challenging in terms of time. Students do not feel adequate to the role.

However, it was notable that some tutors, particularly those in Scotland, saw the concept as worthy of greater use than it was receiving. The reservations which these tutors expressed related to the status of the students within their institution, and it was clear that they regarded it as an unsuitable or inappropriate role for staff to undertake if they were not already in senior positions relative to those to whom they were to act as consultant. The clear implication here is of a school and college culture which still equates knowledge and expertise with seniority. This was reflected in the one comment which dismissed the idea out of hand: it was, said this tutor, inappropriate to the structure in most schools and would be rejected by colleagues as "presumptuous."

A less abrupt assessment of the role was offered by another tutor, which chimes with the positions identified in the students' remarks on the lack of impact of their projects. This tutor suggested that the problems of internal consultancy lay not in the seniority or otherwise of the student within their institution but in the public and private attitude taken towards the course by the school's senior management at the outset. School managements which gave the student their blessing to undertake E828 investigations on the basis that they would not be disturbed or asked to commit themselves to any activity as a result were viewing the work as essentially individual staff development, of no importance to the school. A more supportive position, in which the student negotiated at the outset for a particular set of activities to undertake on behalf of the school, would be more likely to achieve both

acceptance of the consultancy role and a greater impact at the end. However, initiating this kind of negotiation would require a more sophisticated reading of the opening section of the course than many students appear to given it.

Nevertheless, some of the students clearly felt that a quasi-consultancy position, in which they made their expertise available to others and encouraged them to come and tap it as needed, was both desirable and appropriate. This was particularly true of the two primary headteachers. One of them developed at length in the interview a philosophy of headship which presented her role as essentially a consultancy to her colleagues, and she elaborated on this by reference to her management studies on the MA, and particularly to the knowledge she had of teachers' attitudes to their roles and how she was seeking to change them in the light of her work on E828. The other, who had adopted a change agency role in relation to the professional development of her senior management team, spoke of occasions when she had to avoid becoming directive, which she did by telling her colleagues that she was also learning along with them. It would seem at first sight from these interviews that the smaller, less hierarchical primary schools provide a more fertile ground for internal consultancies than the larger hierarchical and bureaucratic secondary schools. This would appear to be borne out by the claim of the deputy head of the Special School, which was another small establishment, that consultancy was in fact the way her role as a deputy head should develop in the light of her success in developing an extensive in-service development programme for the non-teaching assistants.

Where secondary school teachers talked of undertaking a successful consultancy role it was almost always in relation to the set project which invited them to analyse the role of a particular member or group of staff, and make recommendations for its development. A deputy head spoke of her attempts to develop the role of the form tutors in her independent school, which led to recommendations being made to a new teacher with overall responsibility for them. The middle manager referred to earlier who examined the support and in-service development needs of the newly qualified teachers at her school was also able to do this through a consultancy approach. Other attempts to work alongside colleagues of comparable status in a consultancy role, such as was attempted by a member of a senior managment team in relation to an aspect of school strategic planning, were all described as unsuccessful in terms of promoting change, although productive of personal learning.

Discussion.

There would appear to be substantial evidence that the approach of providing a framework and a variety of approaches to carrying out small-scale investigations

into practice within the students' own place of work is of great benefit. It provides an opportunity for students to apply previous learning on a wider stage, and to make immediate and practical use of the deliberative strategies which they have been sensitised to through previous study. Students frequently wrote in the survey about the two MA management modules as if they were an interconnected whole, which made some of the comments difficult to analyse: where it was not clear that they were talking specifically about E828, these complimentary remarks have not been used in this paper! When asked if E828 needed prior study to be effective, every student interviewed stated that one of the other Open University programmes in educational management was essential.

Carrying out E828-style investigations can also provide a significant stimulus towards developing a more reflective learning culture within a student's school or college. Most investigations require the involvement of others in some way, ranging from completing questionnaires through to carrying out quite extensive analyses of their patterns of work as part of an analysis of a colleague's role. Carefully handled, such activities can promote a more thoughtful, deliberative approach to work: it is as if the students, having carried out such activities on themselves in the previous management module, are now assisting others to do the same. However, the extent to which the ripples of reflection which such activities may promote can spread through the organization are likely to depend upon the attitudes of senior staff in particular. Too often, it seems, there may be a tendency for projects of the E828 variety to be seen as producing "results", in the shape of "quick fixes" to perceived problems. There was a sense in some of the responses from senior staff interviewed that they equated a successful project with an innovation successfully introduced, and of frustration when sound recommendations for change were not acted upon. This strengthens the concern among some tutors that the quality of reflection in the projects they assessed was too often perfunctory and rarely showed any signs of the double loop learning which challenges assumptions and reformulates the problems under scrutiny.

The internal consultancy model, however, is seen to have more potential than current validity for promoting changes to school culture. There is now a growing body of teachers and others who have specialist expertise validated by higher degrees, but this receives, in general, little acknowledgement from their colleagues. The idea of assisting such staff to build up an identity as a cadre of potential consultants within an organization does not appear to be particularly well-received: one tutor called it presumptuous, while others indicated that students had to have senior status to be acceptable as consultants to their colleagues. In addition, what

students appear to be motivated by is the ability to be able to make recommendations for changes to practice which are acted upon. As one senior teacher interviewed stated, management research is seen as dependent upon power relations for action. This drive for action rather than reflection matches with the description of his colleagues by one middle manager, who was an enthusiast for reflection and believed that internal consultancy could provide a vehicle for it. He stated that

> Teachers close down quite a lot. There is a difference between teaching and learning, and as teachers they close themselves off from learning. Internal consultancy opens the possibility of understanding their own work and increasing their knowledge of what goes on around them.

The idea that an internal consultancy relationship with a colleague could be a learning relationship for both parties has not received much emphasis either from tutors or within the course. It is, however, a stance which has overtones of the Lomax (1994) characterisation of action research presented in the course materials, and it was interesting to note that one of the tutors was intending to push this research strategy harder in her work this year. But the criticisms of the concept of internal consultancy as presumptuous, and the alignment of the role with senior staff status, suggest that more thought needs to be given to its presentation and the ways in which it can be made to operate. Of course it is presumptuous to declare yourself to be in a consultancy relationship towards your colleagues. But it does not seem inherently presumptuous for a teacher to explain at a meeting of their department that they are engaged in a course of study which invites them to explore management problems in a variety of ways, and to ask for assistance in selecting them. It was striking how rarely this was done: very few of the students interviewed indicated that they had involved anyone else in selecting the projects they finally attempted, although some of them took their ideas to the headteacher to have them "cleared" - a rather different arrangement. Given that their choices were essentially personal, it is not surprising that their school colleagues and management did not see their work as providing inherent potential benefits for the organization.

The approach to employing the internal consultancy role in undertaking a project for E828 would appear to have to rest upon a more negotiative approach to defining the topic at the outset. The student who took an explanation of the course's requirements to the senior management team, and indicated that as well as some topics of specific interest to herself she would like to examine a whole-school issue on their behalf in an internal consultancy role, would both enhance her visibility among the senior staff and provide, potentially at least, a service for which they would either have had

to have paid or provide for themselves at considerable inconvenience. Such action requires a degree of forward planning which perhaps needs to be given more emphasis in the course materials. It also places an emphasis upon decisions by others as well as the student as influences upon the development of a reflective learning culture within the organization. But unless it occurs by some kind of osmosis, such decisions will have to be taken anyway: only in the most loosely-coupled systems can a culture of reflective learning develop without it being embraced to some extent at least by those in senior positions.

The evidence from E828, then, suggests that there is some movement towards a more reflective learning culture in some schools. and a more widespread willingness to explore practice and introduce changes where appropriate, even if the analysis of the problem often lacks reflection on action and a challenging of existing assumptions. The concept of internal consultancy, in our view, still has considerable potential to promote a wider move towards a learning organization, but it appears to need a stronger commitment from senior management to support and facilitate such work by the individual staff before it is going to make the impact of which it is capable.

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